

AN
Omnichannel
CHRISTMAS

2019 HOLIDAY PREVIEW



Presented by
FIELD AGENT®

The Traditional Meets the Digital

Traditions are front and center throughout the holiday season.

From presents under the tree to cookies lovingly baked for Santa, nostalgic greeting cards to sumptuous holiday meals, **it's the traditions that give this season its distinct charm.**

Many of these traditions of course begin with a purchase, often *many* purchases:

- Visits to the shopping center to buy gifts
- Trips to the store to load up on groceries
- Online and in-app purchases galore

Yep, Christmas—more specifically, its traditions—drive *a lot* of consumer spending in the second half of the year.

And, with each new holiday season, the influence of digital and omnichannel retail only grows. You might say the digital is increasingly helping shoppers experience the traditional.

But how will digital, omnichannel retail impact holiday shopping this year? And which retailers, products, and brands will drive holiday retail in 2019?

For answers to these questions, welcome to Field Agent's 2019 holiday preview, "An Omnichannel Christmas." Over the coming pages we share an abundance of insight from five studies with over 4,000 U.S. Christmas shoppers, all to give you a preview of the 2019 holiday scene.

So when you're ready, turn the page, and we'll begin our data-driven look at the shopping methods, retailers, products, and brands poised for a strong 2019 holiday season.

Chris Medenwald, Ph.D.
Editor-in-Chief





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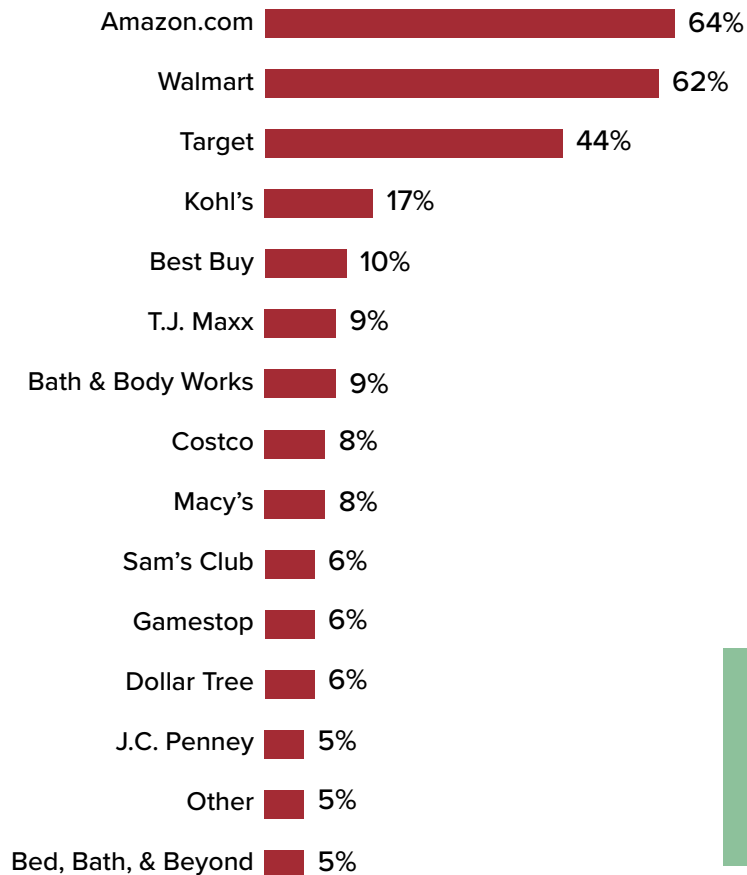
Stock images from Unsplash.com and Pexels.com

Top Gift Retailers

Soon, Christmas trees across the country will be surrounded on all sides by gifts galore. But where will all these gifts come from?

This year, Amazon and Walmart will likely duke it out for the distinction of top gift retailer, with Target and Kohl's making strong showings as well.

When purchasing holiday gifts this year, which 3 retailers will probably receive most of your spending?
Choose up to three.



What are the top challenges suppliers face with retailers?

Dollar General 4%, Barnes & Noble 4%, Dick's Sporting Goods 3%, The Home Depot 2%, Apple Store 3%, Lowe's 2%, Academy Sporting Goods 2%, Nordstrom 2%, Petsmart 1%, Bass Pro 1%, Verizon Store 1%, Petco 1%, T-Mobile Store 0%, AT&T Store 0%

N = 1,497 Christmas shoppers

Top Gift Retailers

Now down to the nitty-gritty. What about the top retailers for particular gift categories like toys, electronics, and attire?

This time we asked Christmas shoppers to identify their *one* top retailer for making purchases in each category. It's looking like Amazon for electronics, Walmart for toys, and Kohl's for clothing/footwear.

Toys

39%	Walmart
24%	Amazon.com
17%	Target
1%	Costco
1%	GameStop



N = 1,497 Christmas shoppers

Electronics

30%	Amazon
22%	Best Buy
19%	Walmart
6%	Costco
3%	GameStop



Clothing/Footwear

21%	Kohl's
13%	Walmart
13%	Target
8%	Macy's
8%	T.J. Maxx





Brick & Mortar Shopping

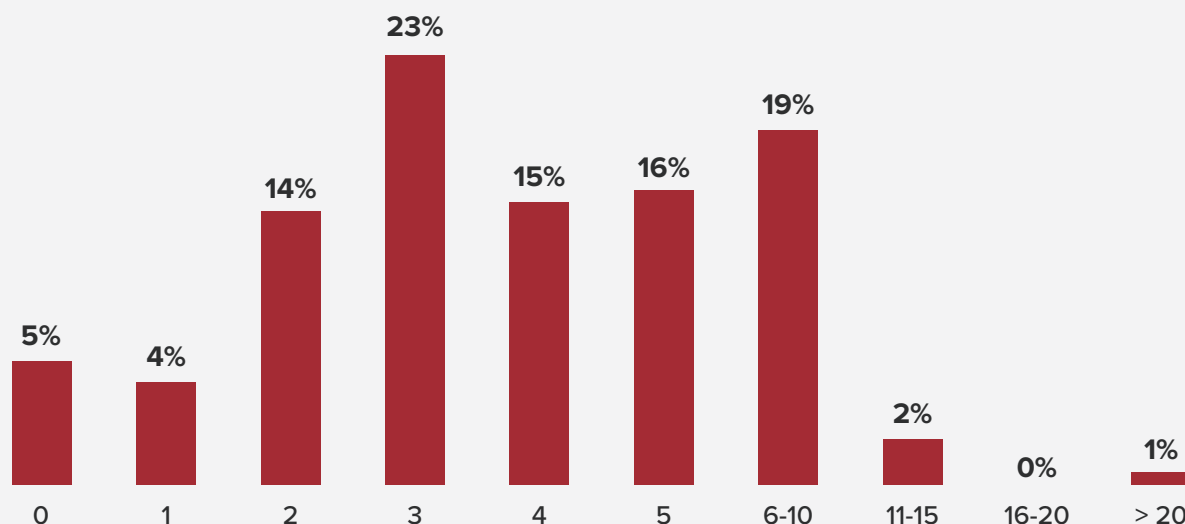
We know, we know: More and more shoppers are buying their gifts online. Yet, for most shoppers, brick-and-mortar is still the go-to method for buying holiday gifts.

We asked Christmas shoppers how many different brick-and-mortar retailers they expect to visit this holiday season to purchase gifts. Only 5% said none, while 38% said they'll probably visit five or more B&M retailers.

38%

shoppers said they'll probably visit **five or more** B&M retailers

How many different brick-and-mortar retailers do you expect to visit to purchase your holiday gifts this Christmas?



N = 1,520 Christmas shoppers



Displays on Display: Holiday Style

Being seen is at least half the battle when attempting to drive retail sales. It's little surprise then that the busiest shopping season of the year is also a popular time for in-store, product displays and signage.

Field Agent regularly helps brands track the execution of their in-store displays and signage. So, last Christmas, we asked agents to visit stores across the country and capture photos of holiday-themed product displays.

Below we share a selection of photos submitted by our agents.

[Click here to see the full photo gallery.](#)



THE HOME DEPOT
Carpentersville, IL



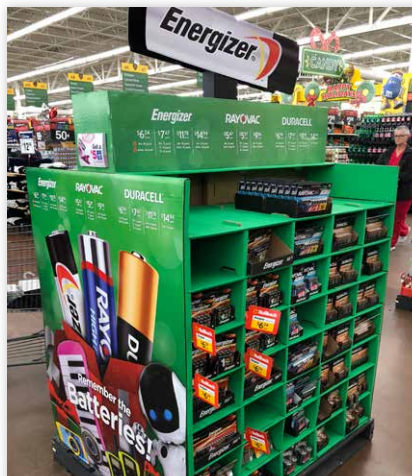
WALMART
Sioux Falls, SD



DOLLAR GENERAL
Krotz Springs, LA



ALBERTSONS
Fullerton, CA



WALMART
Carrollton, GA



PUBLIX
Brentwood, TN

What's In-Store This Holiday Season?

With **Mobile Audits** from Field Agent, you can be in stores throughout the holiday season, seeing exactly what shoppers see. From display compliance to on-shelf availability, **Mobile Audits** offer instant in-store visibility to help brands take control of their retail execution, throughout Q4 and beyond.



Displays & Signage



Prices

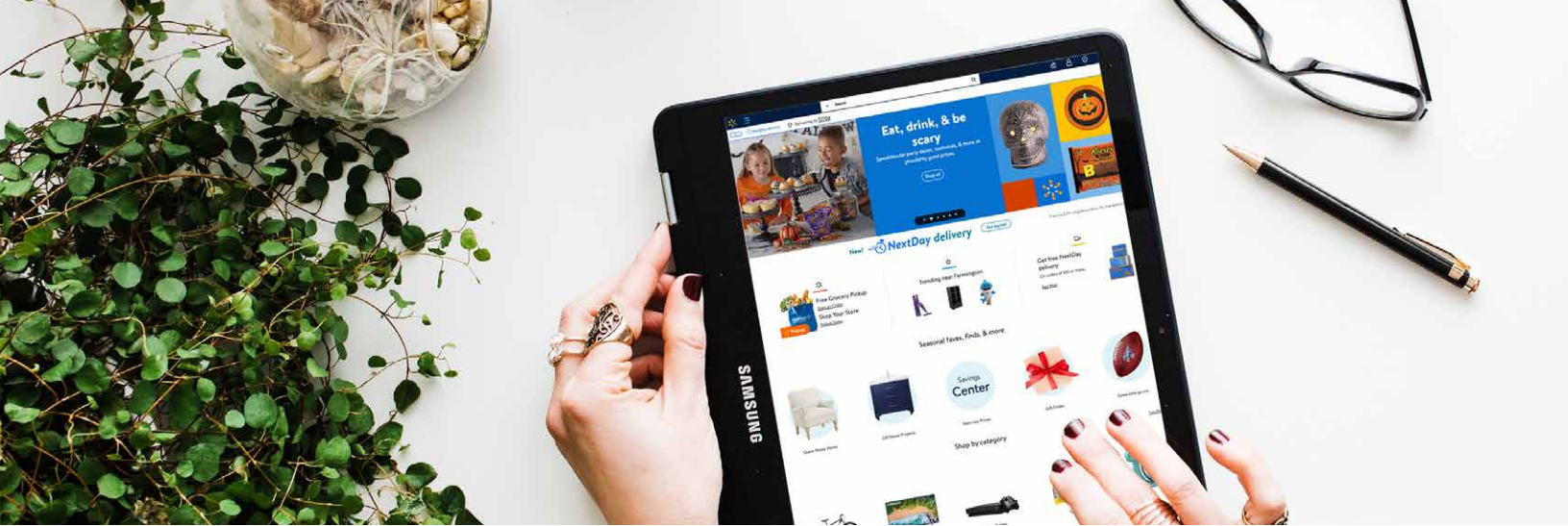


On-Shelf Availability



Planograms

[Learn More about Mobile Audits](#)

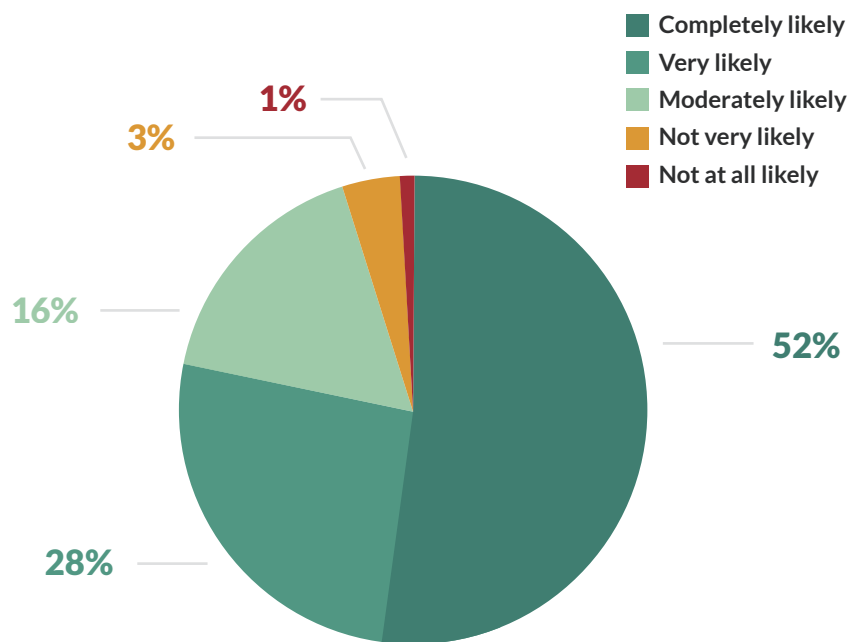


Online Gift Shopping

Ecommerce has of course radically transformed shopping, even holiday shopping. For as long as we've published this holiday report, we've watched the number of shoppers buying gifts online rise steadily every year.

So how likely are Christmas shoppers to buy gifts online in 2019? As you can see, more than half (52%) said they're completely likely—no wavering—to shop for and purchase holiday gifts online this year.

How likely are you to buy gifts online/in-app this holiday season?



N = 1,460 Christmas shoppers



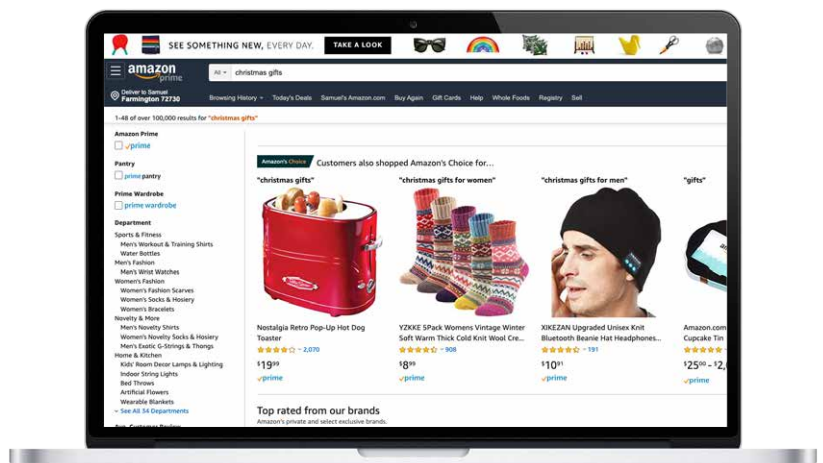
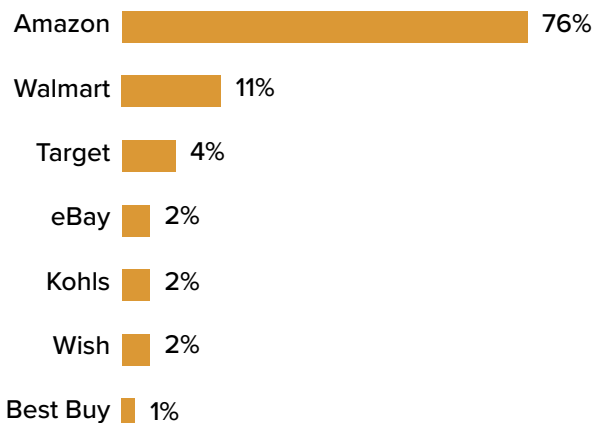
Online Retailers

Amazon's online dominance should extend into the 2019 holiday shopping season. We asked Christmas shoppers at least moderately likely to purchase gifts online, which *one* retailer would receive most of their online spending.

No surprise. Amazon mopped up. Second-place Walmart trailed by 65 percentage points.

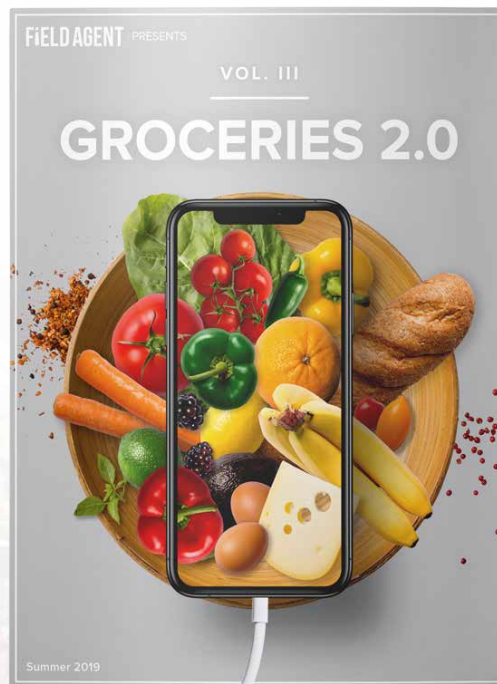
Which one website/app will receive most of your online gift-spending this holiday season?

N = 1,428 Christmas shoppers at least moderately likely to buy gifts online in 2019



Explore the Rise of Digital Grocery Shopping

Based on surveys and studies with approximately 4,500 everyday shoppers, Groceries 2.0, Vol. III is a fun and informative look at “the rise of online grocery-shopping.”



[Download the Free Report](#)



Top Online Gifts

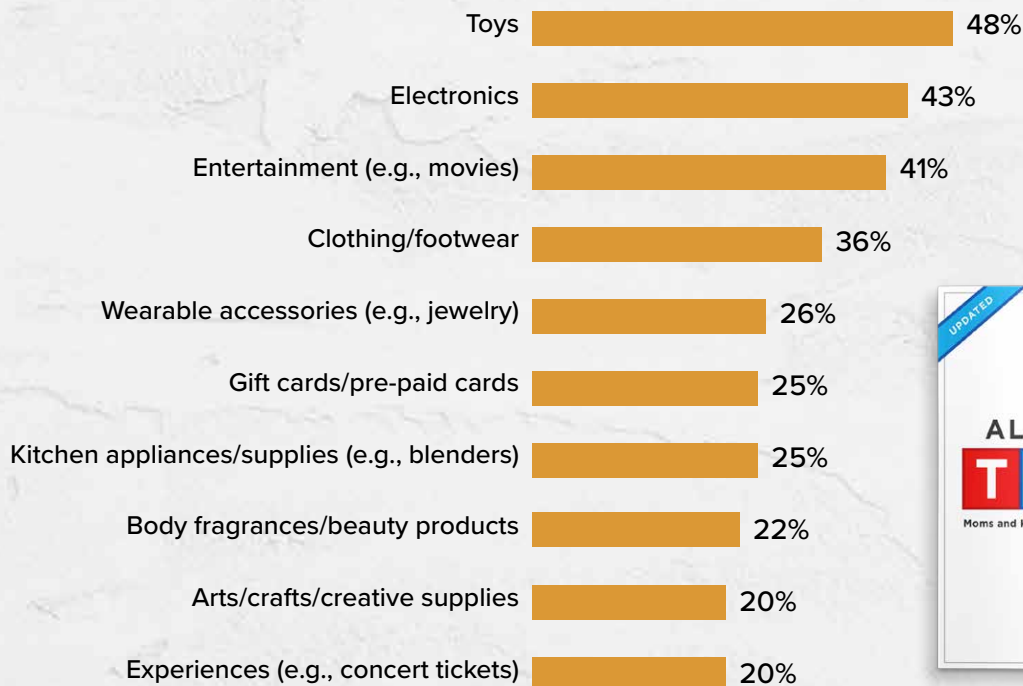
With so much gift-buying shifting online, a pressing question becomes:

What gifts will Christmas shoppers purchase online in 2019?

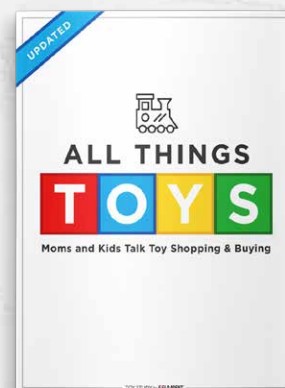
Based on our survey, we're expecting toy purchases to lead the way.

**Which of the following gifts are you likely to purchase online/in-app for the coming holiday season?
Choose all that apply.**

N = 1,428 Christmas shoppers at least moderately likely to buy gifts online in 2019



Home decoration 18%, Pet gifts/pet supplies 17%, Tools 12%, Collectible items (e.g., trading cards) 10%, Foods, beverages, snacks (only for gifts) 10%, Sports equipment 8%, Camping/outdoor equipment 8%, Bikes/scooters/other ride-ons 6%



*Free Report:
All Things Toys*



Holiday Pickup Usage

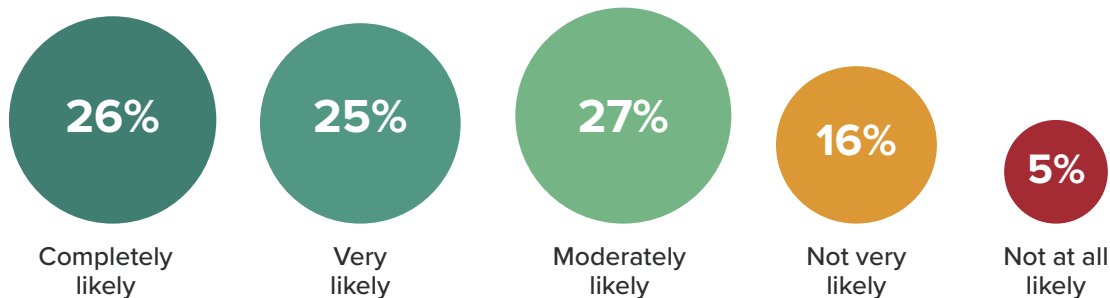
Pickup is a retail phenomenon, yet it's something we often associate with groceries.

So here's a question: Is BOPIS changing the way shoppers purchase and acquire holiday gifts? After all, it's one sure-fire way to avoid crowded holiday stores.

As you can see, in our survey, more than half of online Christmas-gift shoppers are completely or very likely to use store pickup to retrieve their merchandise this season.



Agent Photo



N = 1,416 Christmas shoppers at least moderately likely to purchase gifts online in 2019

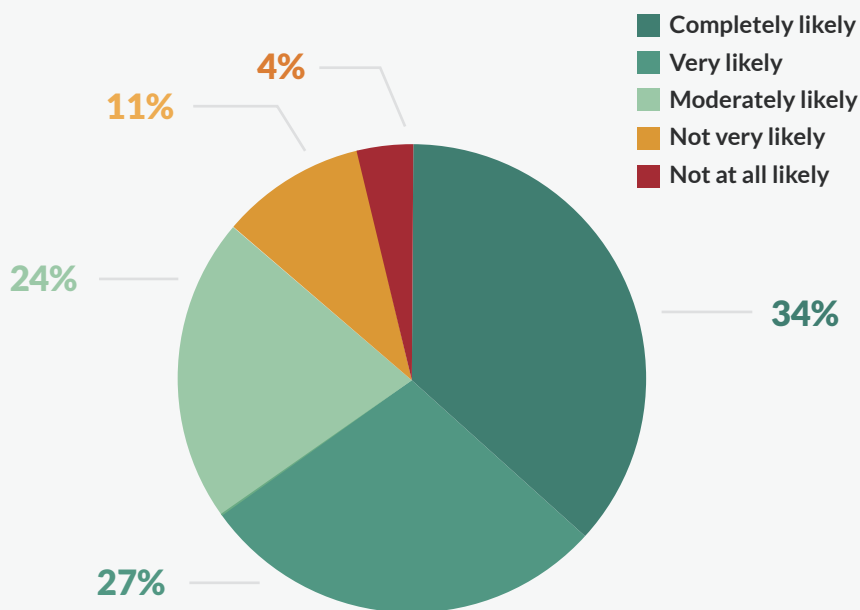
Holiday App Usage

Here in the omnichannel age, mobile apps have become a preferred method for planning, shopping for, and of course making purchases. Can we expect retailer-specific mobile apps to play a large role in 2019 holiday shopping? Yep.

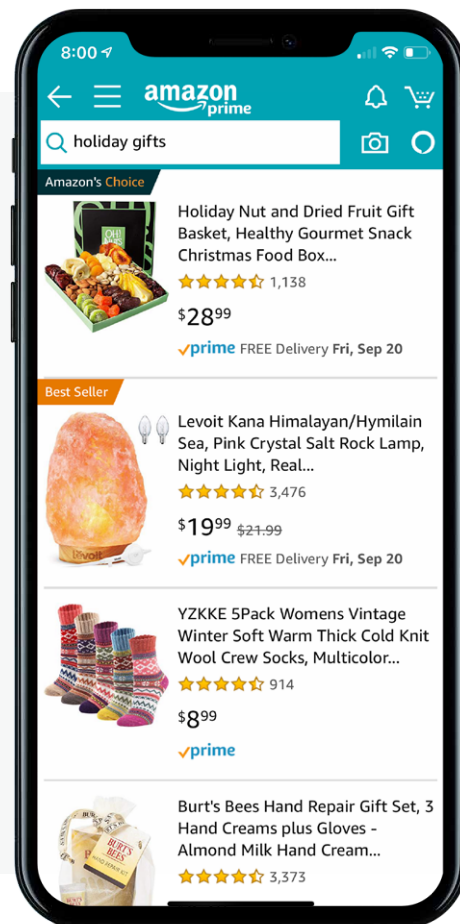
In our survey, 6-in-10 Christmas shoppers said they're completely or very likely to use one or more retailer-specific mobile apps to plan for, shop for, and/or buy gifts this year.



How likely are you to use retailer-specific mobile apps to plan for, shop for, and/or buy gifts this coming holiday season?



N = 1,484 Christmas shoppers

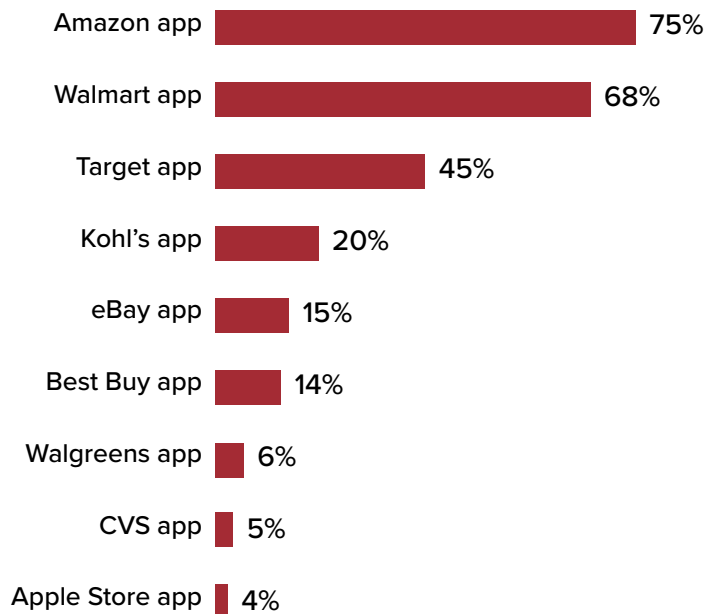


Holiday Apps

Just which mobile apps will Christmas shoppers turn to this holiday season?

As the graph shows, at least 20% of respondents said they expect to use the Amazon, Walmart, Target, and Kohl's mobile apps.

Which retailer-specific mobile apps do you expect to use to plan for, shop for, and/or buy gifts this coming holiday season? *Choose all that apply.*



N = 1,259 Christmas shoppers at least moderately likely to use a mobile app to plan for, shop for, and/or buy gifts in 2019

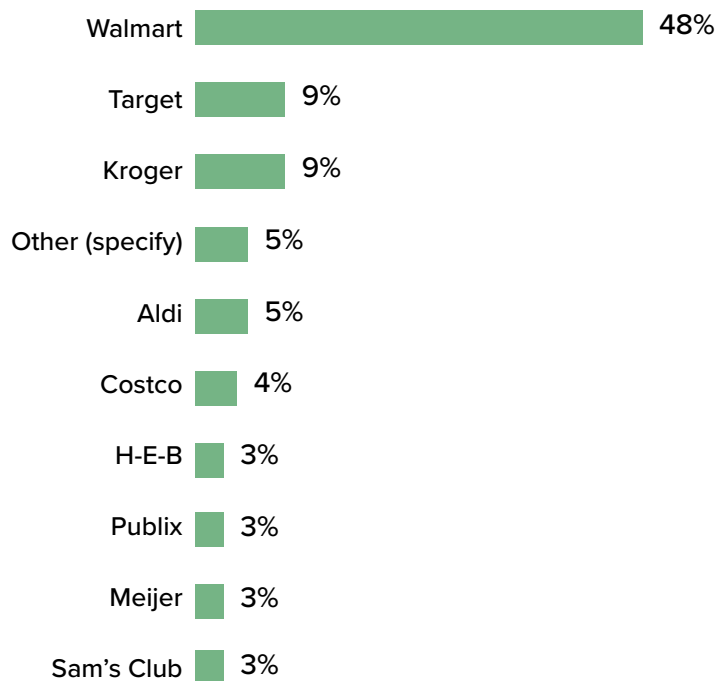


Holiday Grocers

The holidays aren't just about gifts. Oh no. Holiday celebrations are also a marvelous occasion for feasting.

But where will American families purchase their groceries for holiday celebrations in 2019? No doubt about it, Walmart will be the grocery powerhouse this Christmas.

When purchasing foods, snacks, beverages, and ingredients for your holiday celebrations this Christmas, which one retailer will receive most of your spending? *Choose all that apply.*



Amazon 2%, Safeway 1%, Albertsons 1%, WinCo 1%, ShipRite 1%, Hy-Vee 1%, Food Lion 1%, Trader Joe's 0%

N = 1,724 Christmas families

Walmart 

 TARGET



COSTCO
WHOLESALE

H-E-B

Publix

meijer

 Sam's Club

Are You Ready for GEN Z Grocery Shoppers?

They're coming...and they have big appetites.

Will Gen Z shop for groceries like their parents?

Who are their favorite grocery retailers?

What are their preferred grocery-shopping methods?



Download the Free Report



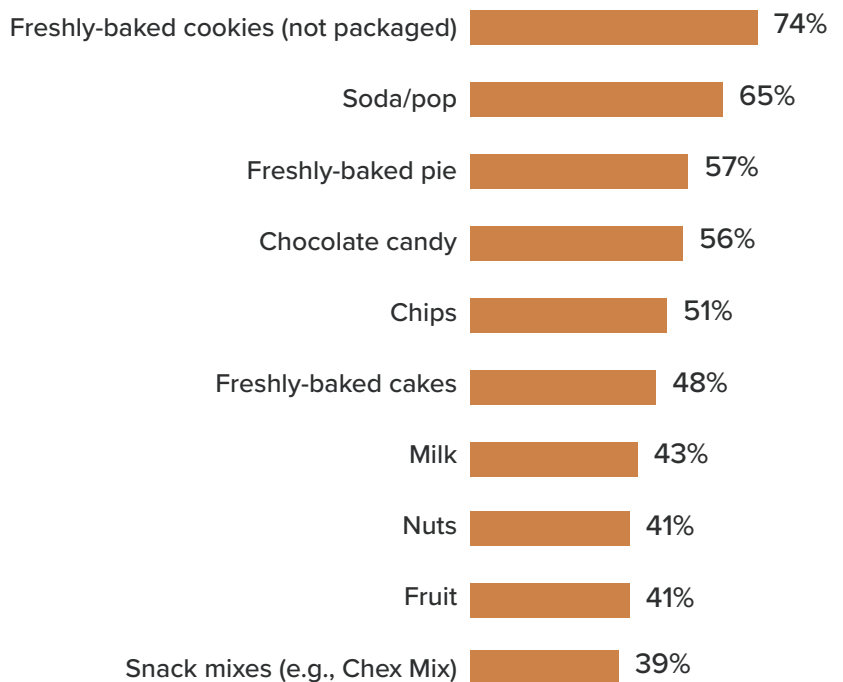
Holiday Foods

What foods, snacks, and beverages will Christmas shoppers buy when they hit stores in the coming weeks to stock up on groceries for holiday celebrations?

We assembled a list of common holiday foods and beverages, and then asked respondents to identify those they're likely to serve on Christmas Eve/Day.

Christmas, it seems, is a good time for cookies, soda, pie, chocolate, and even chips. Delicious.

Which of the following foods, snacks, and/or beverages is your household likely to serve on Christmas Eve and/or Day this year? *Choose all that apply.*



Fruit juice 32%, Pumpkin spice (any food/drink containing the flavor) 31%, Non-chocolate candy 26%, Popcorn 25%, Packaged, shelf-stable cookies (not freshly-baked) 22%, Jello-O/gelatin 14%, Jam/jelly 13%

N = 1,606 Christmas families that will purchase groceries for their household's holiday celebration

Holiday Baking

We associate the holidays with a lot of things: certain movies, songs, destinations, and of course foods and beverages.

Oh, and one more thing we associate with the holidays: baking.

So which baking brands do Christmas celebrants think of when they think of the holidays? We asked 2,100 of them to name the one baking brand they most associate with Christmas. Then we went through all their free-form submissions to provide the top 10 list below.



Top Brands

What one baking brand (i.e., brands used in baking) do you most associate with celebrating Christmas?

Pillsbury	387
Nestle	371
Betty Crocker	338
Hershey's	191
Toll House	93
Duncan Hines	84
Ghiradelli	43
Gold Medal	40
Baker's	30
Wilton	30

of mentions



Holiday Beverages

What beverage brands do folks most associate with the holidays?

As with the baking brands, we asked respondents to cite only one brand name.

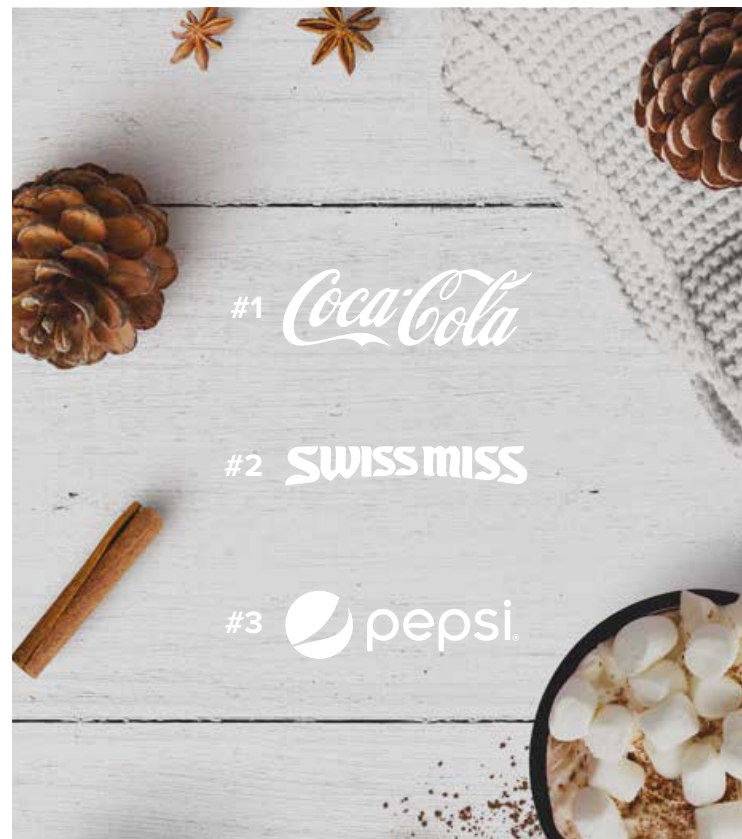
And as you can see, it appears many have polar bears on their mind.

Top Brands

What one beverage brand do you most associate with celebrating Christmas?

Coca-Cola	507
Swiss Miss	129
Pepsi	123
Martinelli's	84
Starbucks	67
Bailey's	50
Nestle	44
Borden	39
Canada Dry	36
Dr. Pepper	35

of mentions



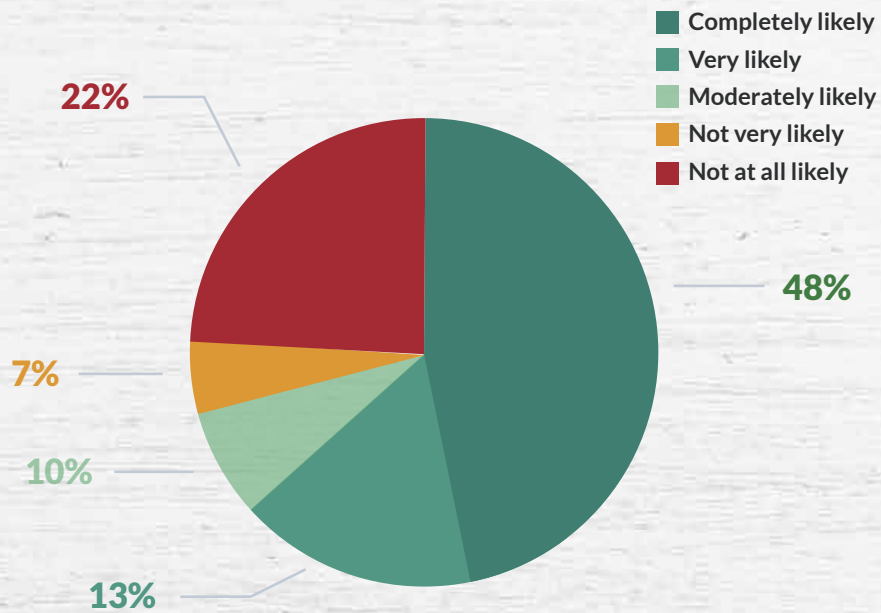
Holiday Coffee Consumption

For many, Christmas Eve runs late into the night and Christmas morning comes early in the morning. So what role does coffee consumption play during the holidays?

Close to half say they're completely likely to enjoy a cup of joe this Christmas Eve/Day.



How likely are you to consume coffee on Christmas Eve and/or Day this year?



N = 1,488 Christmas shoppers

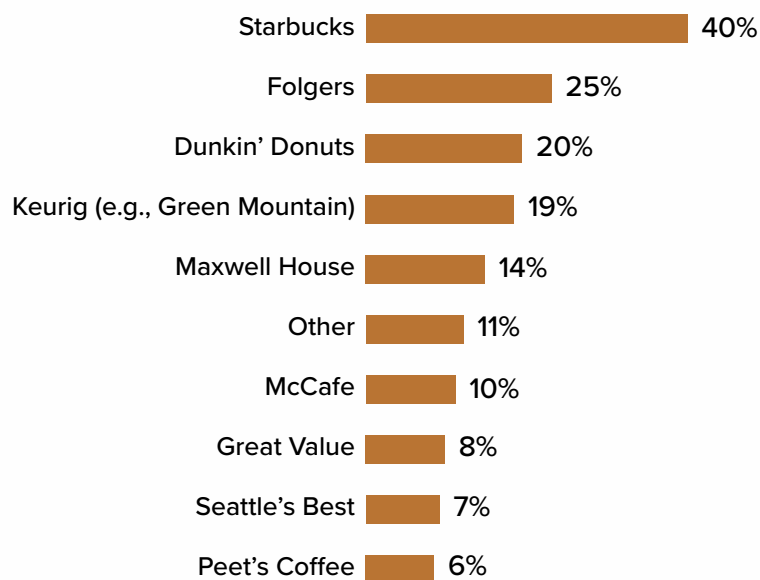


Holiday Coffee Brands

Starbucks? Folgers? Which specific coffee brands will Christmas celebrants have in their cups when the holidays roll around this year?

Yes, clearly, it should be a good year for Starbucks.

What specific coffee brands do you expect to consume on Christmas Day/Christmas Eve? *Choose all that apply.*



Nescafe 5%, Gevalia 5%, Community Coffee 4%, Eight O'Clock 4%, Nespresso 3%, 1850 Coffee 3%, None of the above 2%, Chock Full O'Nuts 2%, Stumptown 1%, Archer's Farm 0%, Blue Bottle 0%

N = 1,030 Christmas shoppers at least moderately likely to drink coffee on Christmas Day/Eve in 2019



Digital Demo Feature

Starbucks' Festive Cinnamon Dolce K-Cups

Christmas and coffee go together like reindeer and sleighs.

As you just saw, over 60% of Christmas celebrants in our survey said they're completely or very likely to drink coffee on Christmas Eve and/or Day this year.

And what was the top coffee brand of Christmas? None other than Starbucks, with 40% of coffee-drinkers saying they expect to enjoy a piping hot cup of Starbucks on the holiday.

In recent weeks, Starbucks has gone all-in with seasonal flavors like pumpkin spice, caramel, white chocolate, and cinnamon dolce, which the company is featuring in branded coffees and creamers sold through stores.

What, we wondered, do coffee-drinkers make of these new flavors?

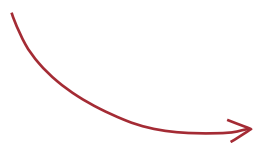
So we at Field Agent enlisted 8 coffee-drinkers to participate in a Digital Demo. An alternative to traditional product demos, Digital Demo is an innovative way to drive "first purchase" of products, track repeat purchases, and generate positive word-of-mouth.

Plus, as you'll see, Digital Demos produce some amazing content.

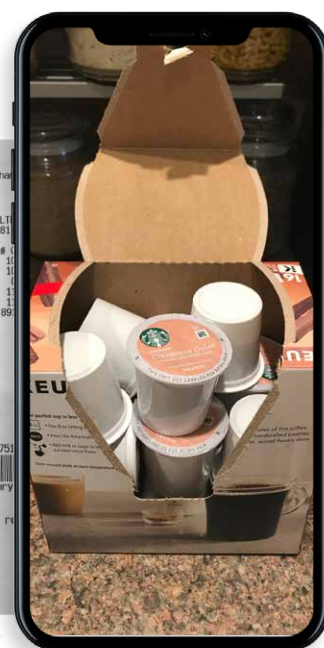
Here's a tour of our Digital Demo of Starbucks Cinnamon Dolce K-Cups.

1. Field Agent targeted 8 coffee-drinkers to purchase Starbucks Cinnamon Dolce K-Cups specifically from Walmart

As the photo and receipt show, shoppers provided proof of purchase



Agent Screenshot & Photo

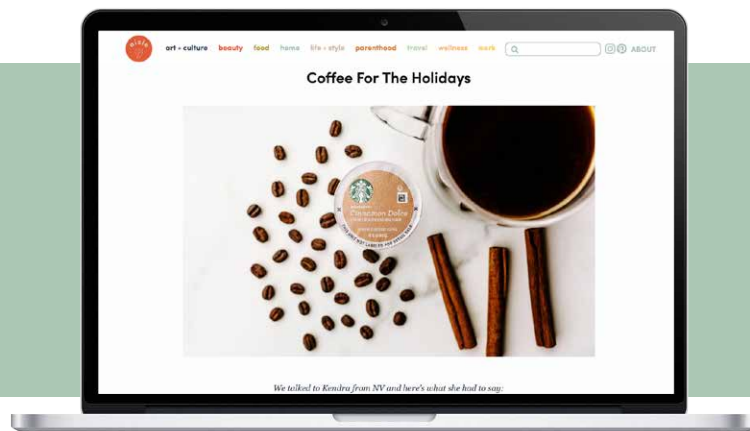




2. Shoppers returned to their homes to try and then rate the coffee

No shopper had tried Starbucks Cinnamon Dolce K-Cups prior to this digital demo

3. Shoppers also answered several free-form questions about the coffee. For ratings of 7 or higher, Field Agent's creative team—consisting of designers, photographers—then transformed their responses into the high quality content seen here.



[Click to view the article on Aisle 9](#)



How Starbucks K-Cups Simplify Kendra's Brew

I like that Starbucks Cinnamon Dolce K-Cups eliminates the mess with coffee ground. I can pop in a K-cup, make my coffee and dispose of the K-cup, mess-free.

Why Starbucks Cinnamon Dolce Is A Holiday Must-Have For Kendra

The cinnamon flavor is a great fit for the holiday spirit. It provides that reminder of holidays with warmth and coziness.

4. The content was published to Aisle 9, one of two online publications owned by Field Agent, so the world could read what real shoppers think about Starbucks' Cinnamon Dolce K-Cups as a holiday drink.

5. Field Agent then encouraged shoppers to share the article (after all, they wrote it) with the friends and family through their personal social media accounts.

[Learn More About Digital Demo](#)



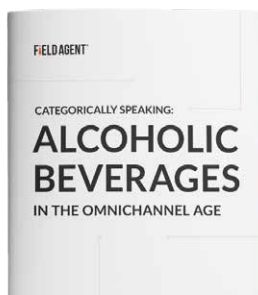
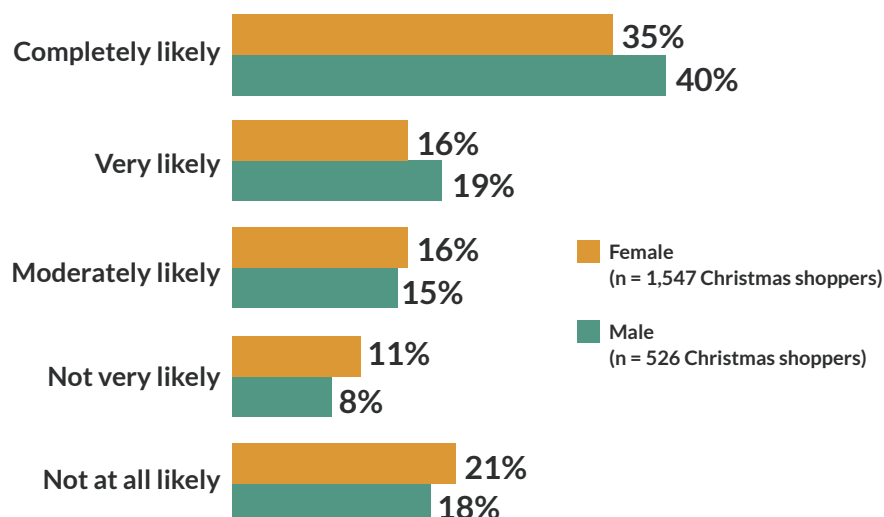


Holiday Alcohol Consumption

The holidays are for celebrating. So how many celebrate Christmas with a drink or two? Clearly, quite a few.

Of Christmas shoppers in our survey, 40% of men and 35% of women say they're *completely* likely to enjoy an alcoholic beverage on Christmas Eve/Day in 2019.

How likely are you to consume alcoholic beverages on Christmas Eve and/or Day this year?



How are alcoholic beverages faring in the Omnichannel Age?

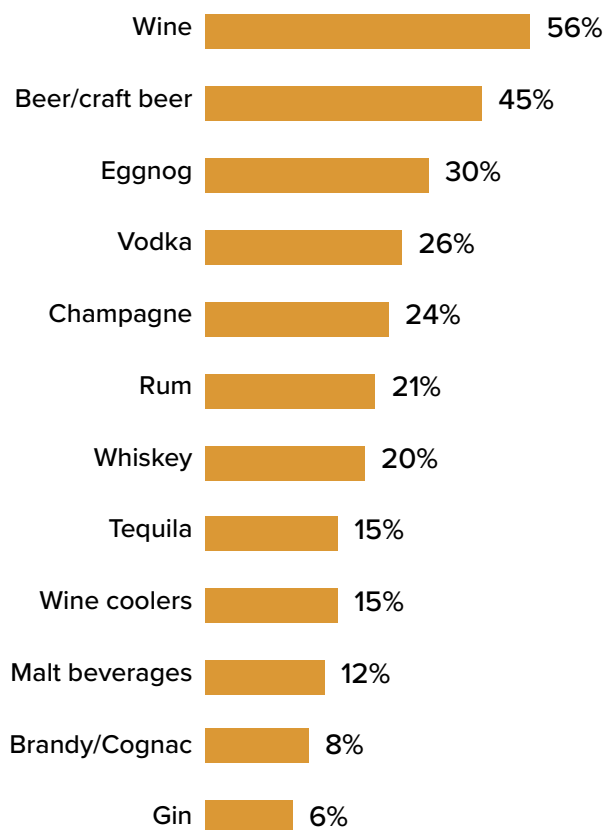


Alcoholic Beverages at Christmas

And what will celebrants be drinking on Christmas Eve and/or Day to make their holidays merrier? Two alcoholic beverages stand out: wine and beer.

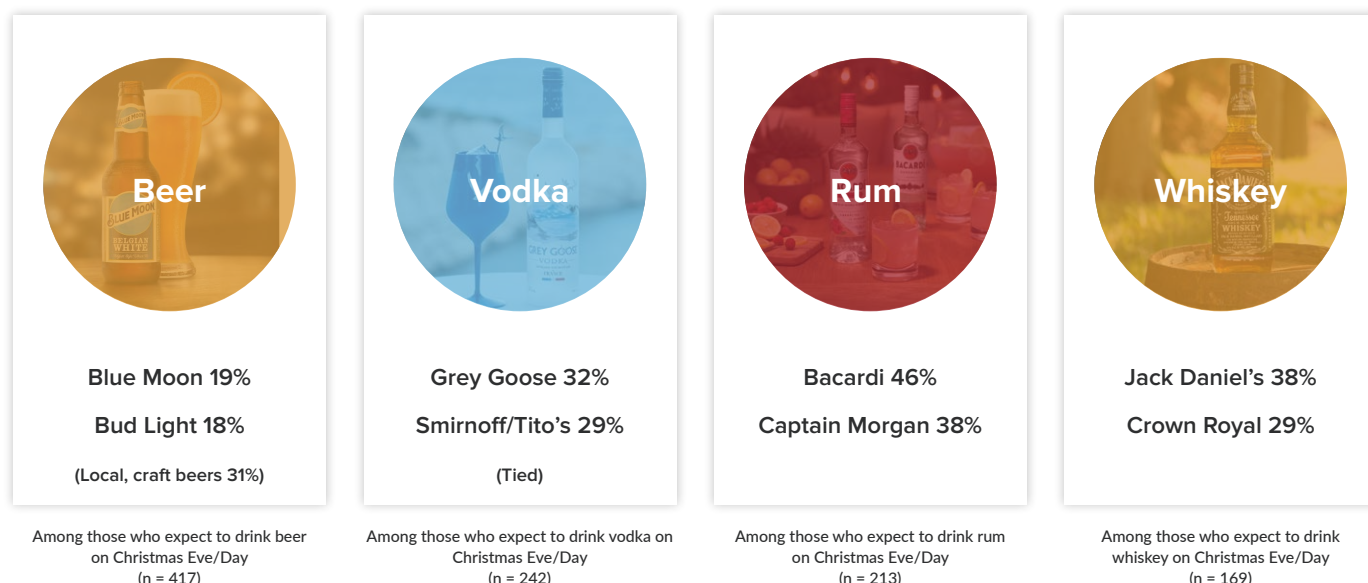
We also asked, “Which specific beer/liquor brands, if any, do YOU expect to consume on Christmas Eve and/or Day?” Below we present the top two brands across four categories.

Which of the following alcoholic beverages do you expect to consume on Christmas Eve and/or Day? Choose all that apply.



N = 959 Christmas shoppers at least moderately likely to drink alcohol on Christmas Eve/Day

Top Alcohol Brands



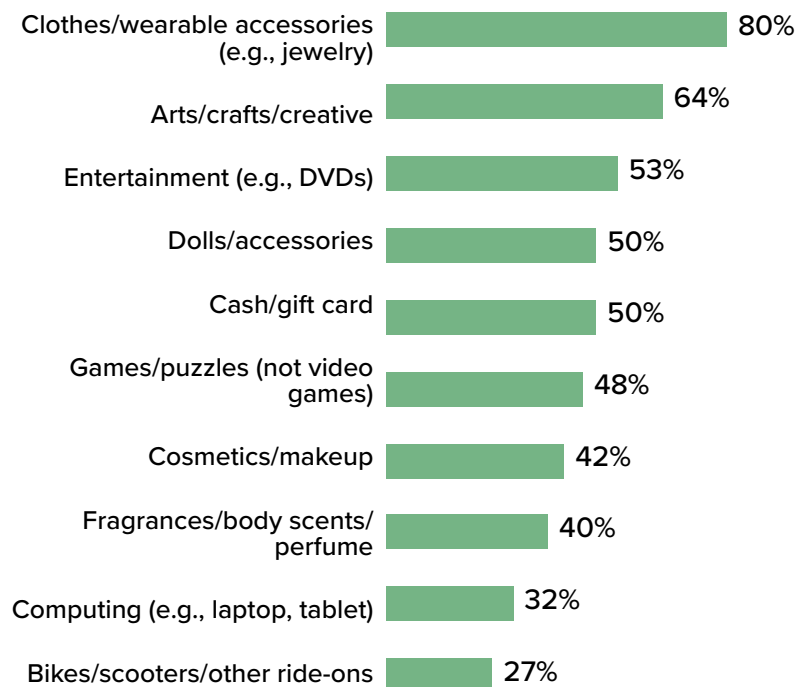


Gifts for Daughters

All those precious little ladies in our lives. What can girls between the ages of 2-17 expect to unwrap on Christmas Eve and Day this year?

As the bar chart shows, clothing and non-digital, wearable accessories like jewelry and watches should be the most common present given to daughter(s), followed by arts/crafts/creative supplies and entertainment.

Looking ahead, which of the following gifts are your daughter(s) likely to receive for Christmas this year? Choose all that apply to at least one of your daughters.



Video game/gaming 24%, Action toys/figures/accessories 23%, Audio/music (e.g., stereo, cds/mp3s) 22%, Outdoor play (e.g., trampoline, playhouse) 22%, Blocks/building sets 22%, Athletic/sports-related 21%, Smartphone/mobile phone 21%, Musical instrument/toys 21%, Indoor playset (e.g., mini kitchen) 20%, Collectible items (e.g., trading cards) 10%, TV 9%, Remote control (e.g., cars, drones) 6%

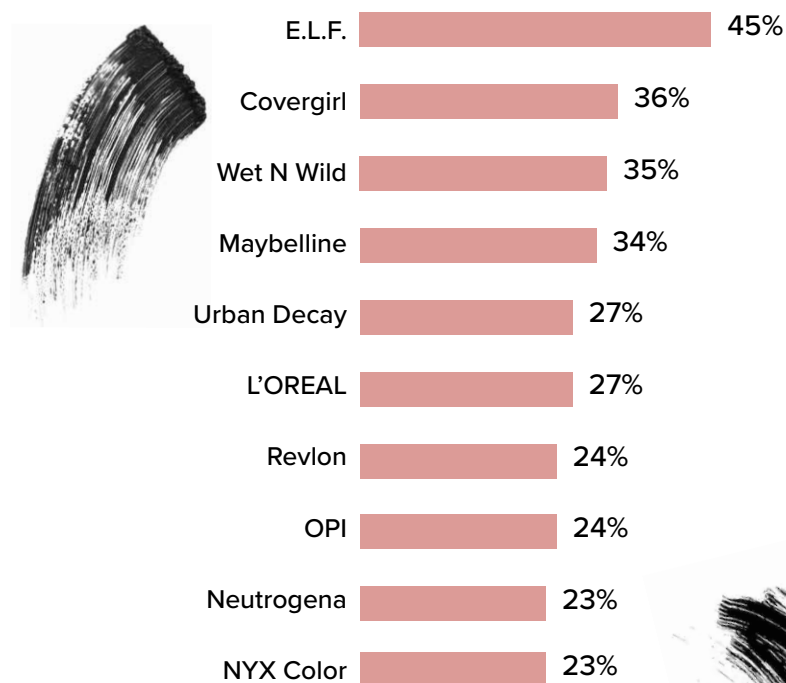
N = 1,051 Christmas families with daughters

Cosmetic Gifts

As seen on the previous page, some 42% of parents with at least one daughter expect to give them cosmetics for Christmas this year.

Below, we present the top cosmetic brands parents expect to give their daughters for Christmas 2019. Almost ironically, E.L.F. should be the most popular makeup gift this holiday season. Call it Christmas E.L.F.

Which cosmetic/makeup brands are your daughters particularly likely to receive this Christmas?
Choose all that apply.



Mac 23%, Bare Minerals 20%, Smashbox 20%, Too Faced 19%, Sally Hansen 17%, Rimmel 16%, Essie, Clinique 14%, Garnier 10%, Lancome 10%, Other (specify) 10%, Mary Kay 7%, Este Lauder 7%, Avon 7%

N = 330 Christmas families who expect to give their daughters cosmetics for Christmas in 2019



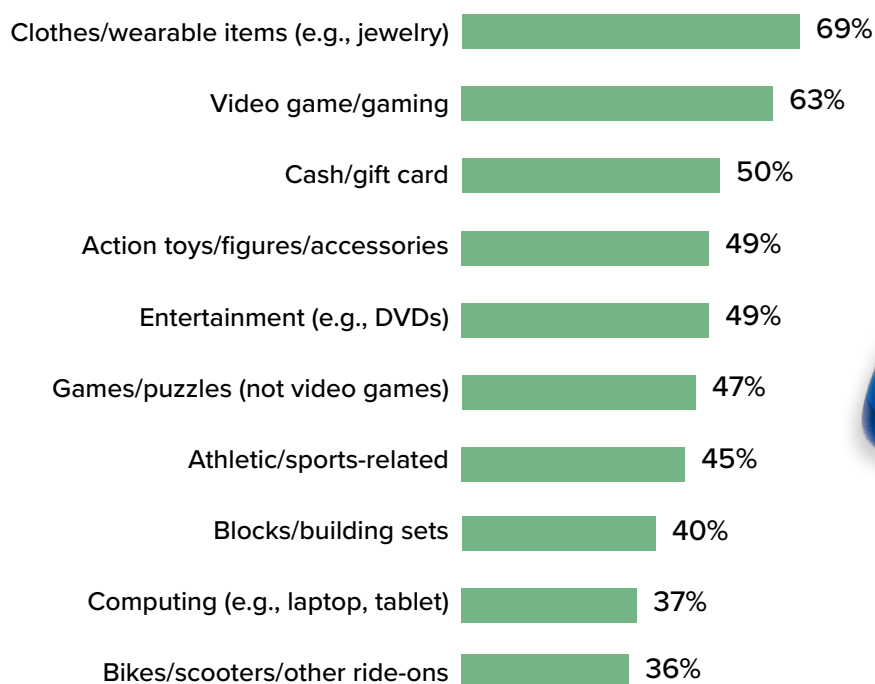
Gifts for Sons

And then there are the little men. How will our sons, ages 2-17, fare this Christmas?

As with daughters, the sons of America can expect clothes this year. But, not surprisingly, they'll also receive video games and action figures, which might ease the pain of unwrapping a new set of underwear.

Looking ahead, which of the following gifts are your son(s) likely to receive for Christmas this year?

Choose all that apply to at least one of your sons. Top 10



Remote control (e.g., cars, drones) 36%, Arts/crafts/creative 34%, Outdoor play (e.g., trampoline, playhouse) 28%, Musical instrument/toys 22%, Smartphone/mobile phone 21%, Collectible items (e.g., trading cards) 21%, Audio/music (e.g., stereo, CDs/MP3s) 19%, Fragrances/body scents/cologne 19%, TV 12%, Indoor playset (e.g., minikitchen) 10%

N = 1,099 Christmas families with sons





Mystery Shopping an Iconic Toy Store: FAO Schwarz

Christmas is a red-letter event for toy retailers. But in recent years the toy industry has been in a state of relative upheaval, as retailers contend with the opportunities and challenges presented by digital commerce and, of course, the closure of Toys “R” Us stores.

So, for this year’s holiday preview, Field Agent got to wondering: What can today’s toy retailers learn from arguably the most venerable toy store in the country: FAO Schwarz of New York City?

To find out, we sent 10 shoppers to 30 Rockefeller Center in NYC where they explored the store, captured photos and video, interacted with employees, and even made a purchase.

Here’s a little of what we learned about FAO Schwarz.

On a scale from 1-5, where 5 is “excellent” and 1 is “poor,” how would you rate FAO Schwarz on the following dimensions?

5

Cleanliness/
Upkeep

4.9

Customer
Service

4.9

Atmosphere

4.7

Merchandise
Selection

3.5

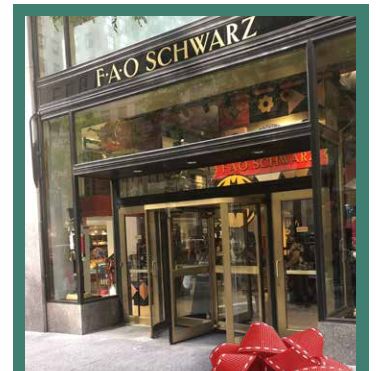
Prices



What 3 words would you use to describe FAO Schwarz?

Words used more than once by mystery shoppers

Magical
Fun
Friendly
Interactive
Trendy
Amazing



Seven of 9 New Yorkers participating in the mystery shop (the tenth participant was from out-of-town) said they'd be either completely or very likely to buy toys from FAO Schwarz to give at Christmas, following their mystery shop experience.

Briefly tell us 3 lessons you think other retailers could learn from FAO Schwarz about selling toys.

Lessons mentioned more than once by mystery shoppers



Agent Photos

Sell Magic

"Create a brand that sells wonder as much as the toy."

Be Interactive

"A few interactive stations really ramp up engagement with the item and the brand."

Personalize Offerings

"Customization! From the ability to create your own racing car to being able to select the play foods you want to take home, the child gets to build their own experience and take-home toy."

Go Big

"Bigger is better. The life size elements are magical for a child. Even if it's just the display, kids are drawn to this."

Build a Kid Destination

"Create a place where children want to be, even though it's the parent spending the money."

Improve Your Serve

"Great employees! Walking around the store, I was constantly greeted and engaged by employees who really gave off a feeling of joy!"

[Click to see the mystery shop video: Inside Look at FAO Schwarz](#)

The **Holiday CX** from Clicks to Bricks

Field Agent has radically reimagined traditional mystery shopping to provide retailers a smarter, faster, more affordable link to CX insights.

Mobile Mystery Shopping uses real shoppers and real shopping encounters to help retailers of all kinds improve the customer experience.

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In-Store



Online



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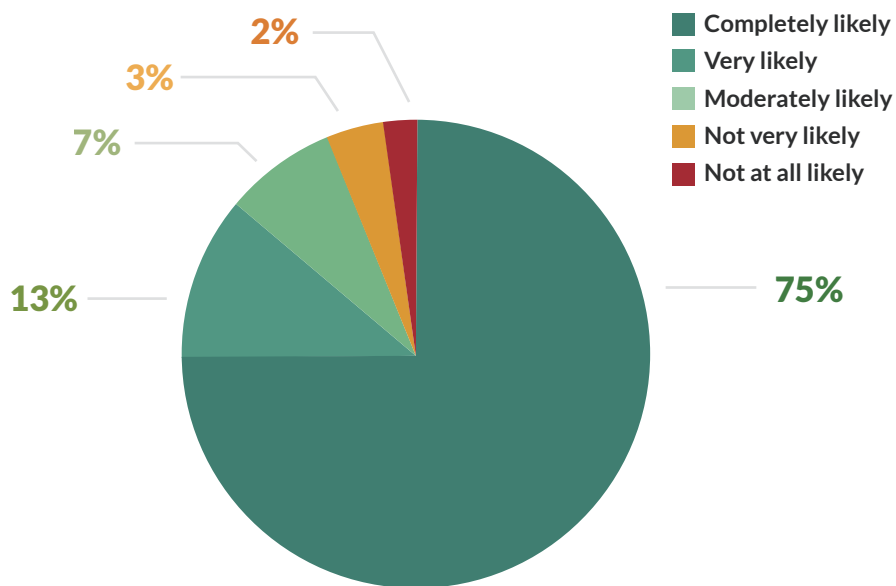
Stockings

It's an image we often associate with Christmas: stockings hanging from a fireplace mantel. But how common are stockings among American households?

Clearly, it's still a very common practice. In all, 75% of households in our survey said they're completely likely to fill stockings this year.

Turn the page to see what they'll be filled with.

How likely are you to fill stockings for your children this Christmas?



N = 1,452 Christmas families

75%

of households in our survey said they're completely likely to fill stockings this year

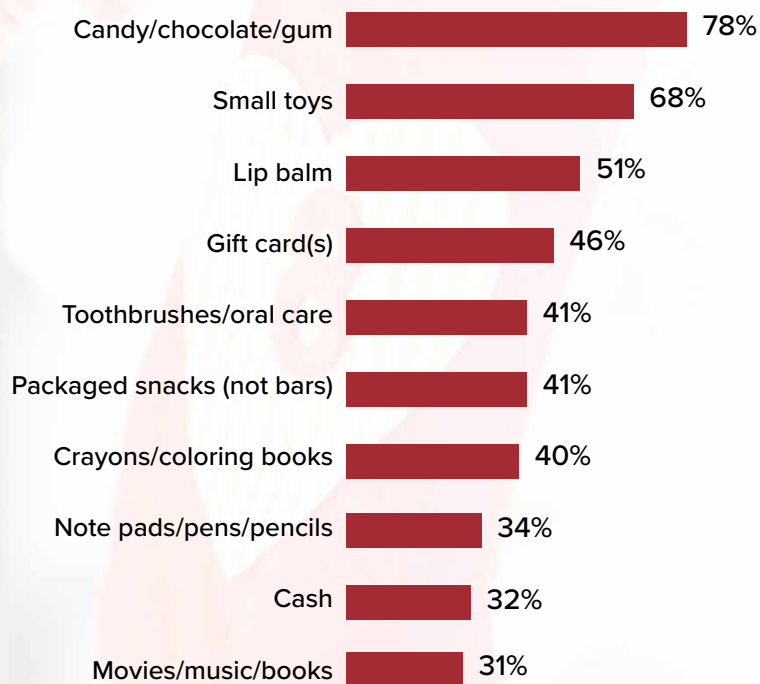
Stocking Stuffers

Let's face facts. Without the stuffers, a stocking is just a sock.

So what will children find in their stockings on Christmas morning in 2019?

As the results below suggest, Christmas should be a sweet occasion this year for many kids.

What will you likely put in your children's stockings this Christmas? Choose all that apply. Top 10



Art/craft/creative (not crayons/coloring books) 31%, Jewelry/wearable accessories 30%, Fragrances/perfume/cologne 25%, Cosmetics/makeup 25%, Lotion 25%, Underwear 22%, Bars (e.g., protein, snack, granola, fruit bars) 22%, Tickets (e.g., movie tickets, theme park tickets) 19%, Video games 16%, Fruit 16%, Pajamas 15%, Razors/razor blades/shaving cream 11%, Clothing (not pajamas or underwear) 10%, Baked goods (not bars) 7%

N = 1,540 Christmas families who expect to fill stockings for their children in 2019

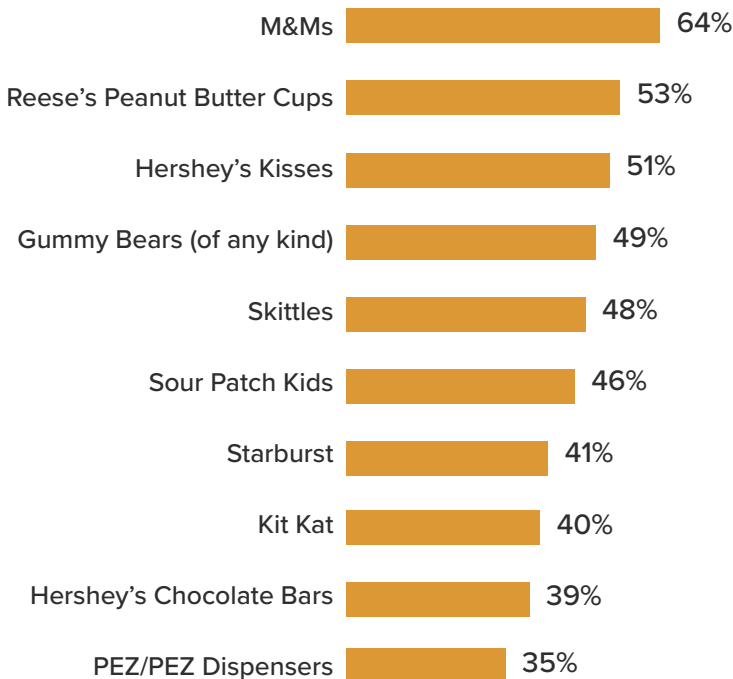


Candy Stuffers

As suggested on the previous page, candy, chocolate, and the like are very popular stocking-stuffers.

M&Ms, it appears, will be Santa's go-to candy for stockings this year. But the top 10 also includes less conventional entries like Sour Patch Kids and PEZ.

Which specific candy/chocolate/gum brands are you particularly likely to include in your children's stockings? Choose all that apply. Top 10



Snickers 30%, Nerds 30%, Twix 30%, Jolly Rancher 25%, Twizzlers 21%, Mints (of any kind) 19%, Wrigley's Basic Gum (e.g., big red, juicy fruit) 17%, Extra Gum 17%, Milky Way 16%, Whoppers 13%, Trident Gum 12%, Orbit Gum 12%, 3 Musketeers 12%, Werther's Original Caramel 10%, Almond Joy 8%, Other (specify) 6%

N = 1,242 Christmas families likely to include candy/chocolate/gum in their kids' stockings in 2019



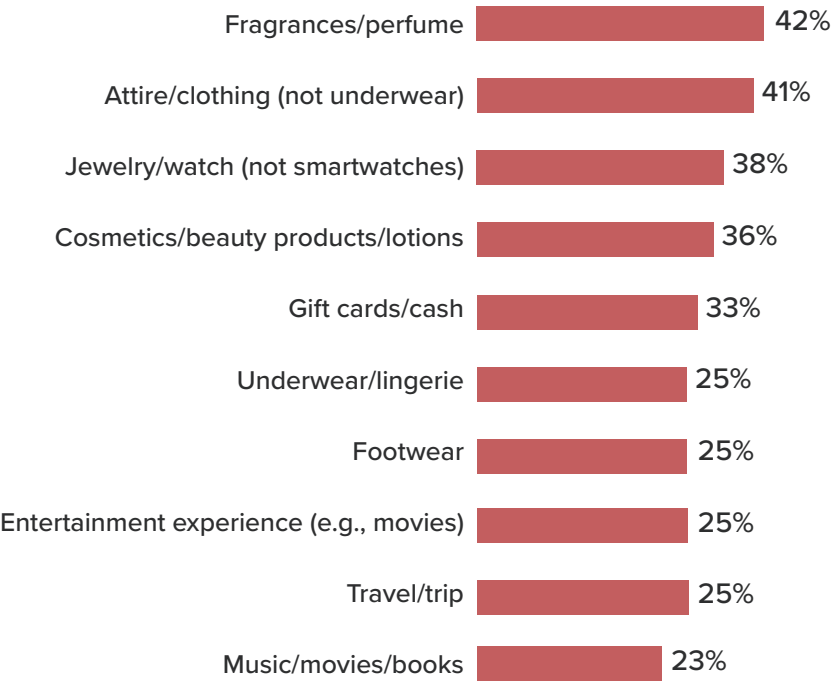
Gifts for the Wife

Here’s a good question: What do spouses expect to give their leading ladies this Christmas?

Married women, as you can see, are most likely to receive fragrances/perfume, clothing, jewelry, and/or cosmetics/beauty products.

I’d say the spouses are already making good choices.

As you look ahead to purchasing gifts for your wife this Christmas, which of the following is your wife likely to receive from you as a present? *Choose all that apply.*



Kitchen appliances (e.g., mixer, breadmaker), 21%, Home decor/furniture 20%, Smartwatch/fitness watch/wearable tech. (e.g., Fitbit) 17%, Computer (laptop, desktop, tablet) 11%, Smartphone 11%, Smart speaker (e.g., Amazon Echo, Google Home) 11%, Non-kitchen, Home Appliances (e.g., Vacuum) 6%, Camera (photo and/or video) 6%, Firearms/hunting equipment 5%, Tools/power tools/hand tools 5%, Auto products/accessories (not automobiles) 4%, Camping/outdoor equipment (not hunting equipment/firearms) 4%, Non of the above 3%, TV 3%, Outdoor grill/grilling equipment 3%

N = 280 Christmas shoppers married to women



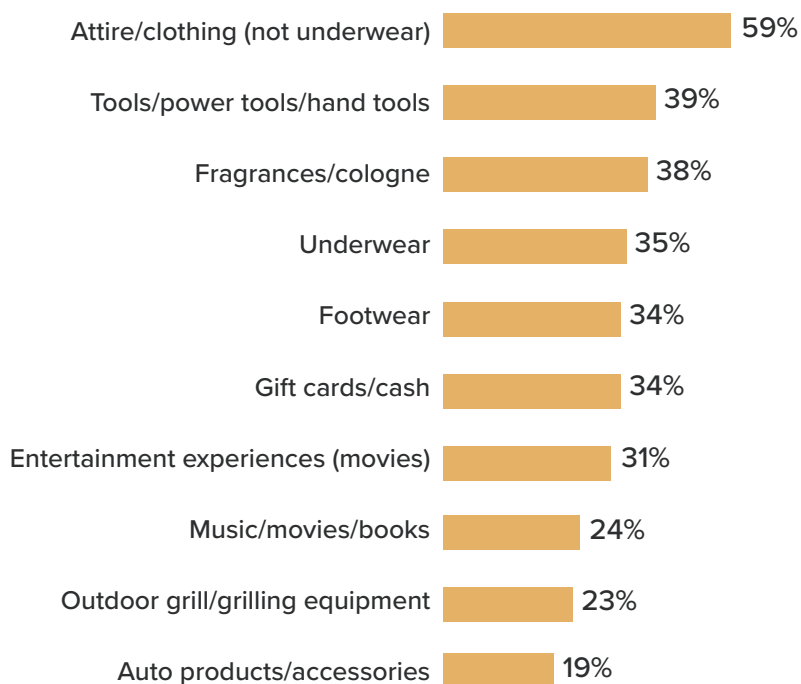


Gifts for the Husband

And now we turn our attention to the ones who are “impossible to buy for”: husbands. What will their spouses give them this Christmas?

Expect married men to receive things like clothes, tools, cologne, underwear, and footwear. Clearly, many see Christmas as an occasion to better-dress their men.

As you look ahead to purchasing gifts for your husband this Christmas, which of the following is your husband likely to receive from you as a present? *Choose all that apply.*



Smartwatch/fitness watch/wearable technology (e.g., Fitbit) 16%, Travel/trip 15%, Firearms/hunting equipment 15%, Camping/outdoor equipment (not hunting equipment/firearms) 15%, Smart speaker (e.g., Amazon Echo, Google Home) 13%, Electric razor 13%, Jewelry/watch (not smartwatches) 13%, Computer (laptop, desktop, tablet) 8%, Smartphone 7%, TV 5%, Home decor/furniture 5%, None of the above 5%, Kitchen appliances (e.g., mixer, breadmaker) 4%, Camera (photo and/or video), Non-kitchen home appliances (e.g., vacuum, dryer) 2%

N = 902 Christmas shoppers married to men

What Women Want for Christmas

Here's the golden question: What do women want for Christmas this year?

We asked over a thousand ladies to tell us what one gift under \$250, more than anything else, they'd like to receive this year. They could answer anything they liked.

Below we present their top general as well as brand-specific wishes.

Let's hear it, ladies.



Top General Wishes

What one gift under \$250 would you most like to receive at Christmas this year? Please be specific.

- #1 Kitchen appliances
- #2 Gift cards/cash
- #3 Computer/tablet
- #4 Digital watch
- #5 Footwear
- #6 Handbag
- #7 Jewelry
- #8 Vacuum cleaners
- #9 Spa/massage
- #10 Bedding

N = 1,574 women

Top Brand-Specific Wishes

- #1 Fitbit Versa 2
- #2 Cricut Explorer Air 2
- #3 Apple Watch Series 3
- #4 Apple AirPods
- #5 KitchenAid Stand Mixer



What Men Want for Christmas

And now for the men. We afforded them the very same chance.

What one gift under \$250 would they ask for? As with the women, below we present the top general and brand-specific wishes.

Clearly, men like their electronics. We've seen this trend since we began asking this question five years ago.



Top General Wishes

What one gift under \$250 would you most like to receive at Christmas this year? Please be specific.

- #1 Gaming
- #2 Footwear
- #3 Cash/gift cards
- #4 Headphones
- #5 Computer/tablet
- #6 Digital watch
- #7 Tools
- #8 Smartphone
- #9 Experiences
- #10 Sports equipment

Top Brand-Specific Wishes

- #1 Nintendo Switch
- #2 Apple AirPods
- #3 Fitbit Versa 2
- #4 Powerbeats Pro Headphones
- #5 Apple Watch



N = 526 men



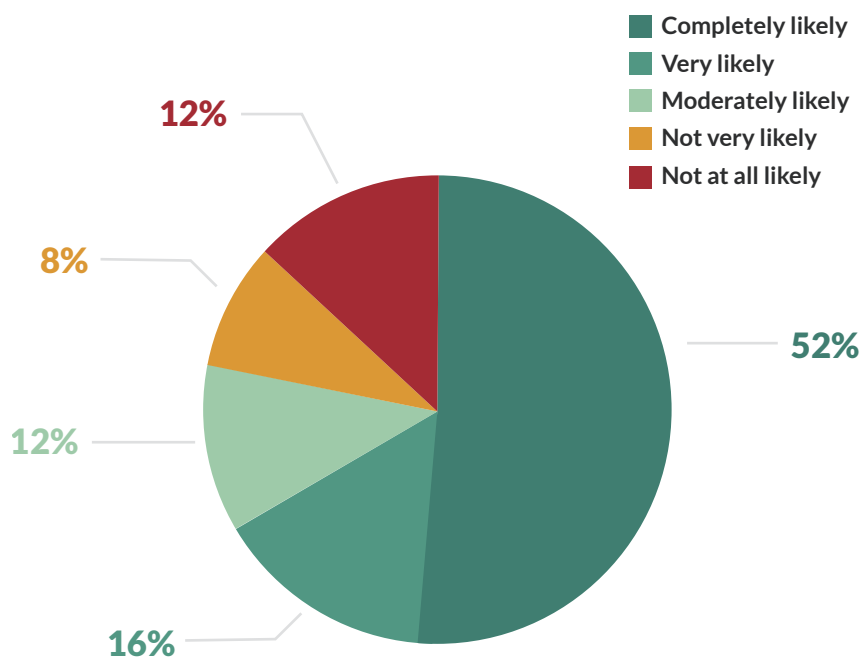
Pet Gift Likelihood

We Americans love our pets. I mean, they're members of the family.

So how likely are dog and/or cat owners to purchase gifts for their furry friends this holiday season.

Wow, more than half say they're *completely* likely.

How likely are you to purchase at least one holiday gift for your cat and/or dog this Christmas?



N = 1,145 Christmas families who own dogs and/or cats



Get the Pet Food Primer

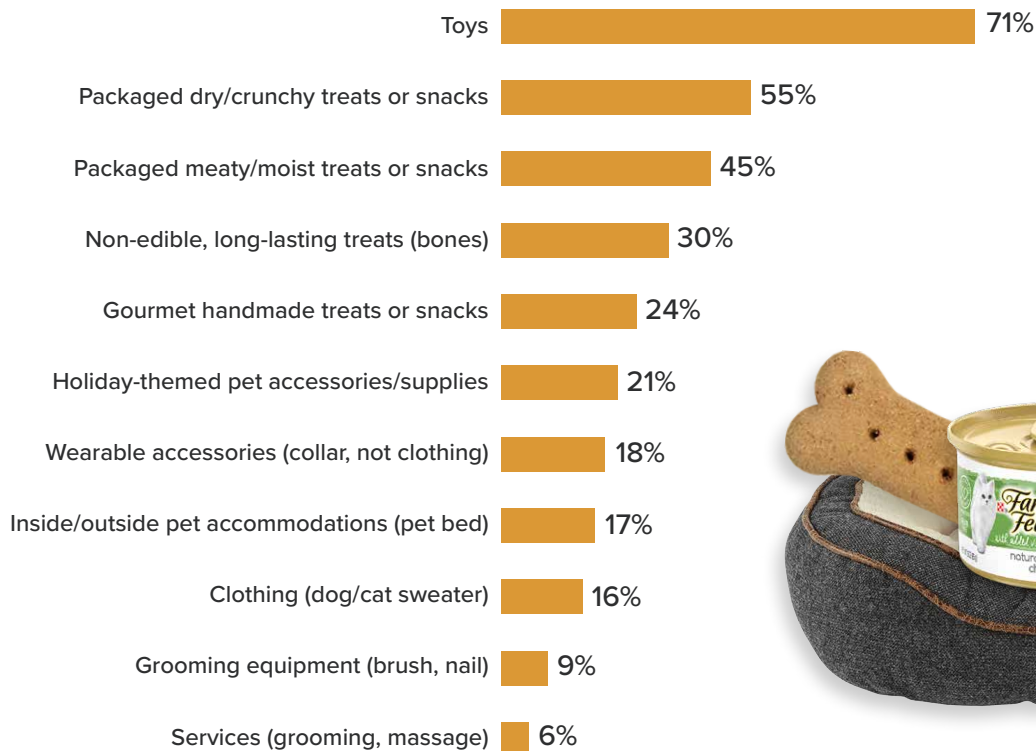
Pet Gifts

But what presents do pet owners expect to give their dogs and cats when the holiday rolls around?

On Christmas morning, it appears a lot of pets will have new toys to keep them entertained, and there will also be plenty of dry and meaty snacks.



Which of the following are you likely to purchase this Christmas as a cat/dog gift (either for the cat/dog or for a member of the family who cares for a cat/dog)? Choose all that apply.



N = 890 pet owners at least moderately likely to give their dog/cat a Christmas gift



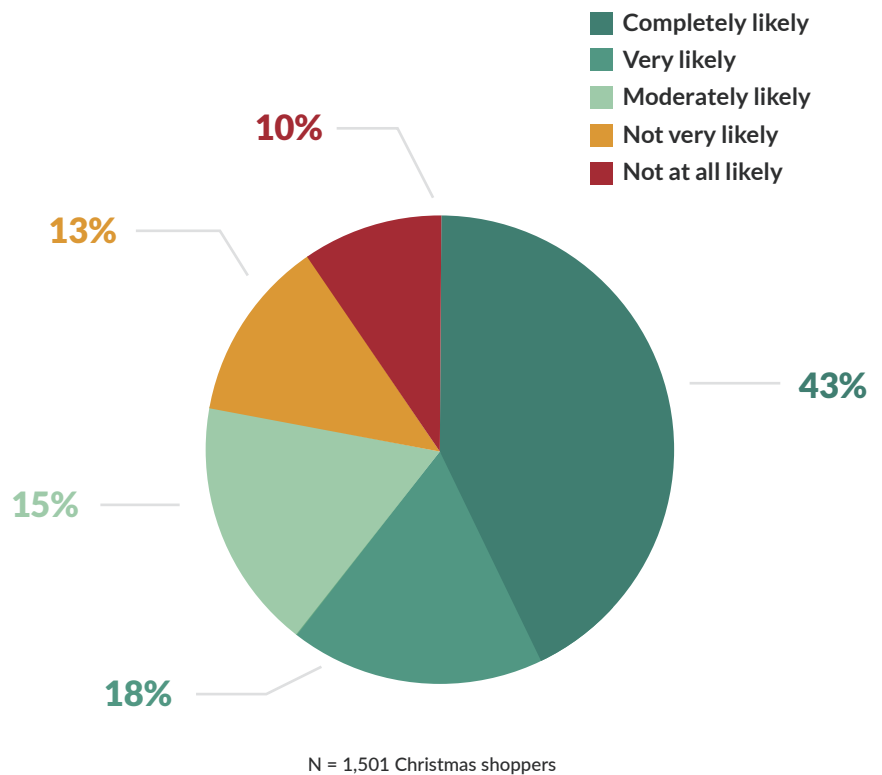
Greeting Cards

Few things say Christmastime like a holiday greeting card.

But how common are purchases of greeting cards during the holidays?

As you can see, 43% say they're completely likely to purchase a Christmas card this year. Breakdowns didn't show much difference between women and men on this question.

How likely are you to buy at least one Christmas greeting card to give to someone else this holiday season?



32% of Christmas families surveyed said they expect to purchase a Hallmark Keepsake Ornament this year

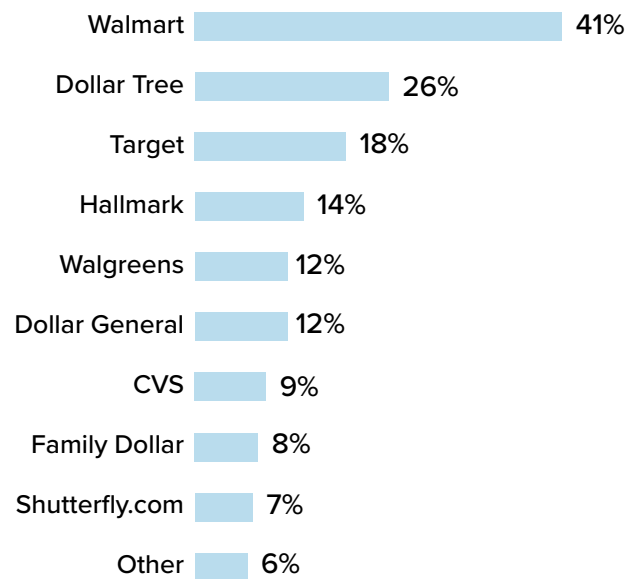


Greeting Card Retailers

So if, as seen, greeting card purchases are common this holiday season, where exactly will Christmas shoppers be buying these cards?

As the chart shows, it'll be many of the usual suspects, along with some retailers like Dollar Tree (at #2) that you wouldn't necessarily expect.

From which retailers (brick-and-mortar or online) will you most likely purchase Christmas greeting cards this holiday season? *Choose all that apply.*



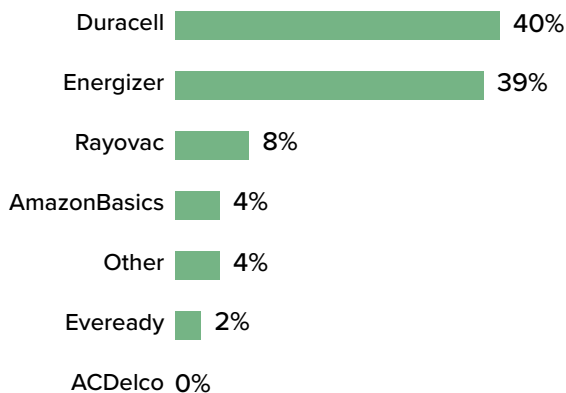
Amazon.com 5%, Independent, local gift shops 4%, Kroger 3%, Hobby Lobby 3%, Costco 2%, Barnes & Noble 2%, Americangreetings.com 2%, T.J. Maxx 2%, Books-A-Million 0%

N = 1,153 Christmas shoppers at least moderately likely to purchase a holiday greeting card in 2019

Holiday Batteries, etc.

Of course, there are plenty of showstoppers when it comes to the holidays. That new toy or electronic won't run without batteries, and of course none of the gifts are getting wrapped without tape.

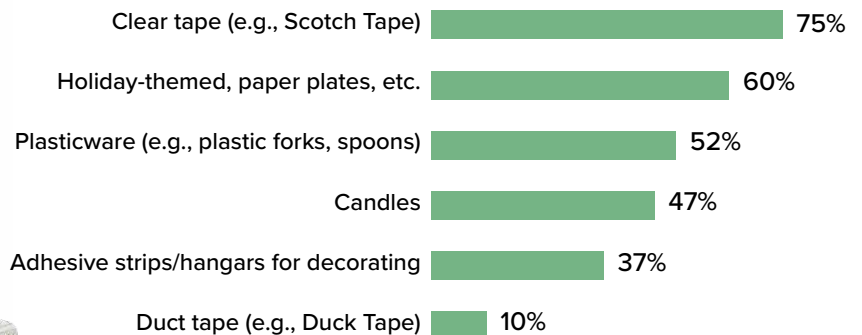
Which one battery brand are you most likely to purchase this Christmas for battery-powered gifts, decorations and the like?



N = 1,710 Christmas families



Which of the following, if any, do you expect to purchase this year to help your household celebrate Christmas?
Choose all that apply.



N = 1,613 Christmas families



Wrapping Up: Key Takeaways

This preview of the 2019 holiday season has come to an end. But before signing-off, let's circle back and consider some of the key takeaways from the report.

On the next page, members of the Field Agent leadership team share what they learned from the report.

1. The “rich get richer,” but smaller retailers can find a niche

Amazon, Walmart and Target for gifts. Walmart for groceries. Sound familiar?

But retailers outside the Big 3 could also make their presence known this holiday season, particularly within specific categories. Think, for example, Best Buy for electronics, Kohl's for clothes, and even Dollar Tree for greeting cards.

2. Online and digital shopping take bigger slices of the holiday pie

More than half of Christmas shoppers in our survey said—no doubt about it—they are completely likely to purchase gifts online this holiday season. Slowly but emphatically, online shopping has changed the face of holiday shopping.

And then there's the whole omnichannel scene, with more than half of online gift-shoppers saying they're completely or very likely to use store pickup to retrieve gifts this holiday season. Likewise, 6-in-10 shoppers are completely or very likely to use a mobile app to assist in their holiday gift-shopping this year.

Yep, the digital is really taking a strong grip on holiday shopping.

3. Yet holiday shoppers continue to rely on brick-and-mortar retailers

But not so fast. Brick-and-mortar remains essential. In all, 95% of Christmas shoppers expect to visit at least one brick-and-mortar retailer for gifts in 2019, and three-quarters say they'll visit more than two B&M chains for Christmas presents.

Clearly, the emphasis many retailers are placing on omnichannel retail is not misplaced. It's not physical or digital; it's physical *and* digital. Something that goes for holiday shopping as well as everyday shopping.

4. For gift purchases, there were obvious and not-so-obvious winners

Toys, electronics, and clothes. Naturally, it'll be a good year for these gift categories. It always is.

But it's interesting to note who is receiving what. For instance, parents tell us their sons and daughters are most likely to receive attire for Christmas, more than any other gift. And perhaps you didn't expect men to wish for gaming gear, and women for kitchen appliances, to the extent they did.

And what about those stocking stuffers!?! Apparently less-obvious gifts like lip balm and toothbrushes will be found in many-a-stockings this year.

5. Some familiar names should dominate the holiday grocery scene

Surprise, surprise. Nearly half of families in our survey said they expect to buy their holiday groceries from Walmart this year. And there were also some very familiar names among the brands shoppers most associate with Christmas. Names like Pillsbury, Nestle, and Coca-Cola.

No doubt, these brands will make strong showings this holiday season as well.





Wrapping Up: Key Takeaways

Members of the Field Agent leadership team describe their key takeaways from the report.

What did you take away from the 2019 Holiday Preview?



"It's clear from the report that omnichannel shopping is no longer just nice to have, it has become a 'must,' especially with holiday shopping. I noticed that in 2019 the 'big's' will keep getting bigger, with Amazon leading the way for shopping online and Walmart, Target close behind."

Rick West, Co-Founder, CEO

"It's surprising that nearly half of shoppers expect to visit three or fewer brick and mortar retailers to complete their holiday shopping. This means that if your brand benefits from being seen, touched in-person, you have very limited opportunities to deliver that experience to your shoppers in a store. It's more important than ever to use the in-store environment to allow your shoppers to experience - not just buy - your products and brands, which FAO Schwarz was shown to do so well."

Renee Brandon, VP, Research & Data



"It looks like a Walmart vs. Amazon battle for the holiday shopping season (and every other day of) this year. With Toys R Us out of the way, Walmart seems to be picking up a lot of that in-store shopper volume. With Toys, Electronics and Entertainment topping kids' wish lists and being the most likely shopped for items online, it seems like Amazon has a bit of an edge. But Walmart can leverage the ease of in-store pickup and the infinite shelves of online."

Sean Womack, Publisher, Aisle 9 & Product 1

"It was really enlightening to see all the different forms holiday shopping takes: gifts, groceries, and even pets. Clearly, the 'fur baby' phenom continues, and retailers better be ready for stocking-stuffer shoppers. Walmart looks to be the clear winner on holiday groceries and Amazon for gifts."

Lesly Webb, VP, Operations



Demos & Details



This report encompasses two mobile surveys (see below), one retail audit (Holiday Displays), one mystery shop (FAO Schwarz), and one digital demo (Starbucks Cinnamon Dolce K-Cups). All studies were conducted entirely through the Field Agent mobile app, and all participants were U.S. smartphone owners at least 18 years of age. With the exception of the display retail-audit (conducted Dec. 7-15, 2018), all studies were conducted Aug. 30, 2019 to Sept. 16, 2019.

All survey data in this report were collected through one of the two surveys below:

General Shopper Survey (N=2,100)

Survey of 2,100 U.S. adults who celebrate Christmas in part by purchasing gifts for others

Gender		Household Income	
Female	75%	< \$35K	21%
Male	25%	\$35-49K	18%
		\$50-74K	24%
		\$75-99K	17%
		\$100K+	20%
Age Range		Race*	
18-34	30%	Caucasian/White	63%
35-44	34%	Hispanic/Latino	17%
45-54	22%	African American/Black	14%
55+	13%	Other	6%

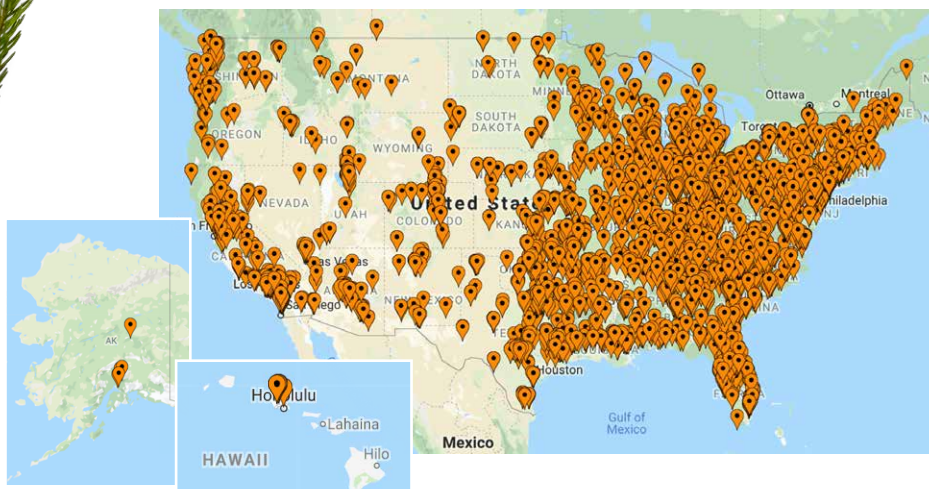
Family Holiday Survey (N=2,100)

Survey of 2,100 U.S. families who celebrate Christmas in part by purchasing gifts for others and who have at least one child younger than 18

Gender		Household Income	
Female	77%	< \$35K	19%
Male	23%	\$35-49K	18%
		\$50-74K	24%
		\$75-99K	18%
		\$100K+	21%
Age Range		Race*	
18-34	32%	Caucasian/White	63%
35-44	45%	Hispanic/Latino	17%
45-54	18%	African American/Black	14%
55+	5%	Other	6%

*We weighted data to reflect the racial percentages above

4,200 Survey Locations



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